

UTS

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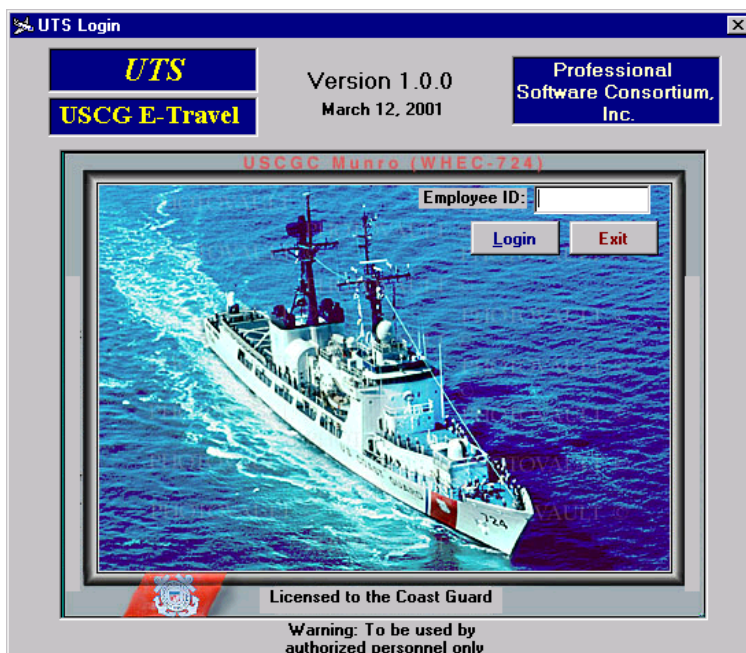
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Further Assistance

Resources are available at the HRSIC
Website: www.uscg.mil/hq/psc/TVL.htm
UTS User Guide - Full volume guide to UTS.
UTS Software & User Error Reports
FAQ's About UTS
Email PSCCustomerCare@HRSIC.usc.mil



Logging into UTS

At UTS login screen, **enter** your **SSN** as the **Employee ID**. For first time users, the **Password Information** screen appears:

At this screen **enter** the following information:

Mother's Maiden Name
Your Date of Birth
Your Town of Birth

Tip: Password must be at least 8 characters and 2 must be **numeric**.

After entering the passwords, **click** the **Save** button.

Forgot my Password

Click on **Forgot my Password** and the **Password Information** screen appears. (See above) At this screen, **enter** the following information:

- Mother's Maiden Name
- Your Date of Birth
- Your Town of Birth

After entering the required information, user must **click** on **Authenticate**. If the information **matches** the **authentication** information, the **New Logon** and **Secondary Password** sections are displayed.

The user must **enter** a **new** Logon and Secondary password.

When finished entering the new passwords, user must **click** on **Save**.

Security Information

Click on **Security** button of the **Personal Profile** screen and enter the information needed to grant access to the UTS program.

Note: For first time users, it is necessary to set the "default AO" field. Otherwise, the UTS program will terminate when attempting to send a transaction to the AO.

At this screen, the **Traveler** must enter the appropriate information to complete each section.

View Modes

For the field, UTS can be operated in one of three **View** modes. Each **View** mode determines what privileges a user possesses. They are:

Traveler - default view to enter transactions.

Proxy - There are two **Proxy** capabilities.

Proxy - Any UTS user may act as a **Proxy** on behalf of any traveler within the same OPFAC, but can only release the action back to the traveler for further processing.

Signature Proxy - Same capability as **Proxy**. In addition, transactions released are electronically signed on behalf of the traveler and forwarded to the AO for approval.

Authorizing - Designated to approve UTS transactions for travelers within the same OPFAC for processing.

Entering Dates

Dates can be entered using the following formats:

- **MMDD** - For example; type 0201 and press **Enter**. The date is displayed as 02/01/01 (defaults to current calendar year).
- **MMDDYY** - For example; type 020101 and press **Enter**. The date will be displayed as 02/01/01.
- **Pop-Up Calendar** - Enter dates using the calendar that appears when the date field is **double-clicked**. The calendar defaults to the current month and year.

Entering Amounts

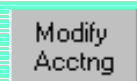
Amounts can be entered using the following formats:

- **With Decimal Point** - If entering an amount that includes cents, such as \$200.50, type **200.50** and press **Enter**. The amount will be displayed as \$200.50.
- **Without Decimal Point** - If entering a whole number, such as \$200.00, type **200** and press **Enter**. UTS will enter the decimal and display the amount as \$200.00.

Entering Accounting Data

To create a travel transaction, an accounting appropriation is necessary to determine funds availability and to charge the appropriate account.

For all transactions, the **Modify Acctng** button will appear.



Click on **Modify Acctng** and perform one of the following actions:

- **Enter Appropriations**
- **Select a RAN Code** (if applicable)
- **Enter Accounting Remarks**

Press **Enter**, or **Tab** to advance to the next field and continue on.

When finished with all required fields, click on **Validate Accounting**.

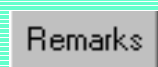
Current Request Accounting Lines									
a/c	s/d	appr	limit	alt fund	alc	prgelem	costacct	obj	
2	Q	001	153	30	0	PP	47400	200	
+									

Entering Remarks

When creating any travel transaction, it may be necessary or beneficial to add some remarks to the travel action (i.e., explain why an appropriation was created or modified). A **Remarks** button will always appear on the input screen.

Note: Remarks are for the benefit of the **Traveler** and the **AO**. Remarks are not transmitted to HRSIC for viewing.

Click on **Remarks** button to access the **Remarks Request** screen.



The screen will be a **Remarks** text box. **Type** the remarks in this box.

Remarks Request screen showing a text box for entering remarks. The screen includes a header with 'MANN, HARRY', 'Remarks Request', and 'TDY2'. A message states: 'This is where you can enter the desired remarks for the travel action being processed. Remarks are normally used to request or authorize special entitlements that are not typically covered by per diem.' At the bottom are 'Cancel Changes' and 'Return' buttons.

When finished, click on **Return** to **save** and return to prior input screen.

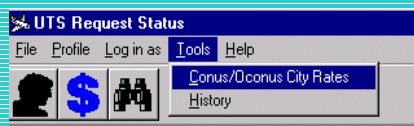
Per Diem Rates Look-Up

There are 3 methods used to **lookup the locality per diem rate** for a particular location. Which method depends on the input screen displayed.

At the **UTS Request Status** or **UTS Requests Requiring Action** screen, use one of the following:

Method 1: - Click on the dollar sign (\$) button.

Method 2: - Click on **Tools** menu, then click on **CONUS/OCONUS City Rates** option.



Method 3: - At the input screens for authorizations, orders, advances, and settlements, click on the **View Other Info** menu and then click on the **Rates** option.



After using one of the methods described in items **1 - 3** above, the **Location Lookup** screen appears.

Location Lookup screen showing a list of states/countries. The 'State/Country' field is set to 'va' and the 'City' field is empty. The list includes TX TEXAS, UGANDA, UKRAINE, UNITED ARAB EMIRATES, UNITED KINGDOM, UNITED STATES, URUGUAY, UT UTAH, UZBEKISTAN, and VA VIRGINIA. The 'Select State or Country' button is highlighted.

At the **State/Country** field, type the **first letter** of the state or country then click the **Up/Down arrows** until the desired name is displayed. Click on the **name** to select or press **Enter**.

At the **City** field, type the **first two letters** of the city. This displays a list of city names with the beginning letters for the selected state or country. Click the **Up/Down arrows** until the desired name is displayed, then click on the desired city **name** to select or press **Enter**.

After selecting a **State/Country** and **City**, the **UTS City Rate Lookup** screen appears displaying the locality rates for the selected city.

UTS City Rate Lookup screen showing a table of rates for Indianapolis, IN. The table has columns for Effective Date, Max Lodging, and Max MIE. The rates are: 01/01/1999 (\$70.00, \$42.00), 01/01/1998 (\$79.00, \$38.00), 01/01/1997 (\$71.00, \$38.00), 04/01/1996 (\$66.00, \$30.00), and 01/01/1994 (\$71.00, \$34.00). A 'Return' button is at the bottom.

When finished looking at the locality rates, click the **Return** button.

Travel History

A history of UTS transactions is created for every user as a resource for research and answering inquiries. Steps to utilize the functions of the travel history depend on which **View** mode is used:

- **Traveler**
- **Proxy**
- **Authorizing**

Travel History, (cont'd)

Accessing the Travel History - Traveler View:

At **UTS Request Status** screen, click on **Tools** and select **History** or click on **binoculars** icon. The **Select Travel Order** screen appears.

At this screen, point and click on desired **travel order** to select. All of the listed travel orders can be selected by clicking on **Select All**.

Tip: Press and hold the **Ctrl** key to select more than one travel order.

After selecting travel order(s), click on **Display/Print History**. The **History** screen will appear.

At the **History** screen, the following options are possible:

Previous Order - If more than one travel order is selected, click on this button to return to the previously displayed order.

Next Order - If more than one travel order is selected, click on this button to advance to the next available order.

More Order Data - Click on this button to display the **TDY Travel Order** screen.

Print - Click on this button to generate a print-out of the history record.

View Request - Click on this button to display the **Local Travel - 1164** screen or the **Request for Advance** or **Settlement** screen.

Return - Click on this button to return to the **Select Travel Order** screen. Then user may select another travel order and display or print the history, or go back to the **UTS Request Status** screen.

UTS Help System

A Help System is included with UTS to find explanations of features and detailed instructions to guide users through the various program functions. Access the UTS Help System by clicking on **Help** at the top of any screen and choose one of these options:

Contents - Select to see a display of the available topic categories.

Index - Select to see an alphabetical listing of UTS Help topics.

This Screen - Select for a Help topic to screen currently displayed.

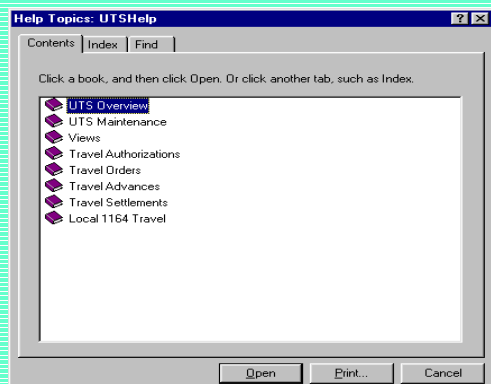
About UTS - Select to see a Help topic describing the UTS program.



Tips for using the UTS Help System:

When a Help window is open, the following options are available:

- Users can **maximize** or **resize** help windows as needed.
- Click on **Help Topics** to return to screen displaying the **Contents**, **Index**, and **Find** tabs.
- Click on **Print** to receive a print-out of the topic
- Click on **>>** to advance to the next topic in the browse sequence, or **<<** to return to the previous topic.
- Click on any word or phrase **underlined and highlighted in green** to auto-jump to a topic that describes the underlined item.
- Under the heading **See Also**, click on **link** displayed to jump from one topic to another related topic. Click the **Back** button to return to the previous topic.



Request for TDY Travel Authorization

A Travel Authorization must be initiated by a **Traveler**, **Proxy**, **Signature Proxy** or **Authorizing Official**.

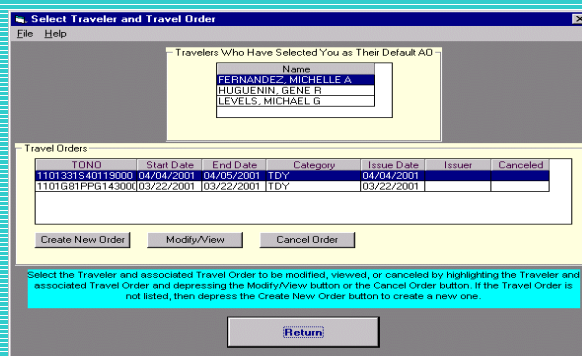
> Creating a Travel Authorization in the Authorizing view mode:

Note: An **Authorizing Official** may only create orders for those users who have designated them as their "**default AO**".

At the **UTS Requests Requiring Action** screen, click on the **Orders** button at the lower right-hand corner of the screen.



At the following screen, the top will show "**Travelers Who Have Selected You as Their Default AO**". From this list, select the traveler for whom orders are to be created and click on **Create New Order**.



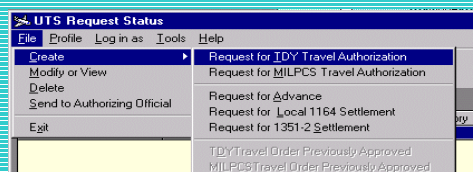
Note: The **AO** may also "Modify/View" or "Cancel Order" from here.

> Creating a Travel Authorization in the Traveler view mode:

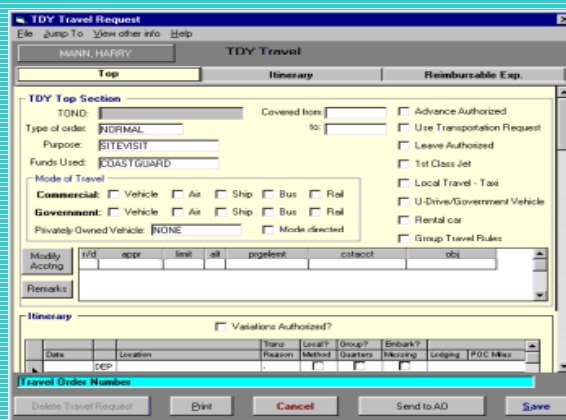
At the **UTS Request Status** screen, there are **two** ways to create a **Request for TDY Travel Authorization**:

- Click on the **Create** button
- Click on the **File** menu and then point to the **Create** option.

A drop down menu appears listing a variety of travel actions.



Click the **Request for TDY Travel Authorization** option. The **TDY Travel Request** screen appears.



Note: **TDY Travel Request** screen has (3) sections; **Top**, **Itinerary**, and **Reimbursable Exp.**

Enter the required information in each of the sections to create the **Request for TDY Travel Authorization**. (Use the drop-down **HELP** menu option for further instructions.)

Note: For **BLANKET** orders, make sure the Covered To/From dates are for the **whole** period of the authorized TDY.

Travel Itinerary

The **Itinerary** section records the details regarding the trip. Click the **Itinerary** tab at the top of the **TDY Travel Request** screen or the **down** arrow on the **slide bar** at the **right** to access the Itinerary section.

Date	Location	Trans Reason	Group?	Embark?	Messing	Lodging	POC Miles
02/01/1999	DEP	PR					
	ARR	TD	LDP	OQ	OM	\$0.00	0

Completing the Itinerary section:

Variations Authorized - Click this item if the traveler will be allowed to **deviate** from the ordered itinerary. Click this item **again** to **de-select**.

Depart Date - The departure date on the first line of the itinerary automatically defaults from the **beginning date** entered at the **Period Covered** field in the **Top** section. Press **Enter** to continue or type a different date if necessary.

Depart Location - At this field, the **Location Lookup** screen automatically appears.

At the **State/Country** field, type the **first letter** of the state or country then **click** the **Up/Down arrows** until the desired name is displayed.

Click on the **name** to select.

At the **City** field, type the **first two letters** of the city name. This displays a listing of city names, for the previously selected state or country, beginning with those letters. **Click** on the desired city **name** to select.

Transportation - A drop down list of various transportation modes appears. **Click** the **Up/Down arrows** until the desired mode is displayed. **Click** on the correct **mode** to select.

Note: When **Group Travel** rules are selected, the computation program will **not** calculate **per diem** for the Group Travel leg.

Group ? - When **Group Travel Rules** is activated in the **Top Section**, and the transportation mode is **PP, CP, CV, GP, GR, GV, TP, TV, AF, or CS**, the user must specify whether Group Travel rules apply. If Group Travel rules apply to the leg, **click** this box.

City & County
File Help

Departing Location Lookup

State/Country: VA VIRGINIA
City: Norfolk

TX TEXAS
UGANDA
UKRAINE
UNITED ARAB EMIRATES
UNITED KINGDOM
UNITED STATES
URUGUAY
UT UTAH
UZBEKISTAN
VA VIRGINIA

Select State or Country

Cancel Done

Arrive Date - The date at the previous **Departure Date** field defaults to the **Arrival Date** field. Press **Enter** to accept or type a new date.

Arrive Location - Use the **same method** explained at the **Depart Location** field to complete the **Arrive Location** field. This should be the location where the traveler will stop to perform **official duty**.

Note: At the **Arrival Location Lookup** screen, **click** the **Onboard Ship** box if the location arriving at is a Government Vessel.

A drop down list of US Coast Guard **ship names** appears. Begin typing the name of the ship or **click** the **Up/Down arrows** until the desired ship name is displayed, then **click** the correct ship's name to make a selection.

Travel Itinerary, (cont'd)

Onboard Ship

CGC CONFIDENCE

CGC CIMARRON
CGC CLAMP
CGC CLEAT
CGC COBIA
CGC CONFIDENCE

Reason for Stop - A drop down list of various reasons for stops appear. The **default** value is **TD - Temporary Duty**. Press **Enter** if correct. If not, **click** the **Up/Down arrows** to the desired reason. **Click** on the correct reason to select.

Method of Reimbursement - A drop down list of various per diem computation methods appear. The **default** value is **LDP - Lodgings Plus**. Press **Enter** if this is correct. If not, **click** the **Up/Down arrows** to the desired method. **Click** on the correct method to select.

Quarters - A drop down list of various lodging types appear. The **default** value is **CQ - Commercial Lodging**. Press **Enter** if this is correct. If not, **click** the **Up/Down arrows** to the desired type. **Click** on the correct type to select.

Messing - A drop down list of various meal types appear. The **default** value field is **CM - Commercial Meals**. Press **Enter** if this is correct. If not, **click** the **Up/Down arrows** to the desired type. **Click** on the correct type to select.

Lodging Cost - **Enter** the **anticipated daily lodging cost** for the location where the traveler will remain overnight.

POC Miles - **Enter** the official distance of the travel if POC is used.

Tip: Use the procedures previously explained to complete the **return** travel leg or **additional** travel legs for the itinerary.

When finished with the itinerary, complete the **Reimbursable Expenses** section, if necessary, or **save** and release to the **AO** for **approval**.

Inserting Itinerary Legs

To complete the itinerary of a **Travel Authorization** or **Settlement**, it may be necessary to add a leg rather than re-entering the entire itinerary.

Complete the following steps to insert an itinerary leg:

Click on **Insert Leg**. A new leg will be inserted.

DEP Date	Location	Trans Reason	Group?	Embark?	Messing	Lodging	POC Miles
03/22/1999	DEP Indianapolis, IN INDIANA	CP					
03/22/1999	ARR Morristown, NJ NEW JERSEY	TD	LDP	OQ	OM	\$75.00	0
03/22/1999	DEP Morristown, NJ NEW JERSEY	PR					
03/26/1999	ARR Morristown, NJ NEW JERSEY	TD	LDP	OQ	OM	\$0.00	0
03/26/1999	DEP Morristown, NJ NEW JERSEY	CP					
03/26/1999	ARR Indianapolis, IN INDIANA	MC				\$0.00	0

Point and **click** on **arrive date** or **depart date** where the new itinerary should be inserted.

Note: After the new leg is inserted, it may be necessary to change the **arrive/depart dates** or the **arrive/depart locations**.

Make any necessary changes to the newly inserted itinerary leg.

Deleting Itinerary Legs

When completing the itinerary section of a **Request for Travel Authorization** or **Settlement**, it may be easier to delete a travel leg rather than re-entering the entire itinerary. This action may be necessary when a travel leg was entered unnecessarily or erroneously.

Complete the following steps to delete an itinerary leg:

Point and **click** in either the **arrive** or **depart** date fields of the leg that should be deleted.

Click on **Delete Leg**. UTS will delete the selected itinerary leg.

Note: An itinerary leg consists of a **depart** and **arrive** line. **Both** will be deleted.

Reimbursable Expenses

The **Reimbursable Expenses** section is used to record the anticipated expenses the traveler will incur that are not associated with per diem.

Completing the Reimbursable Expenses Section:

Click the **Reimbursable Expenses** button at the top of the **Travel Request** screen or the *down* arrow on the **slide bar** at the right side of the screen to access the Reimbursable Expenses section.

Complete this section by entering the following information:

Nature of Expense - A drop down listing of various expense items appears. Click the *Up/Down* arrows until the desired expense item is displayed. If the user types the first letter of the description, UTS scrolls the listing until locating the first item beginning with this letter. The user may then use the *Up/Down* arrows to display the exact item. Once the correct item is displayed, **click** on this item to select.

Tip: If there is no item in the drop down listing that matches the description of the expense, then the expense is not a reimbursable expense item. See your AO.

Amount Proposed - Enter the expected amount of the expense.

When finished entering the anticipated reimbursable expenses, **Click** on **Save** or **forward** it to the **Authorizing Official** for approval.

Request for Advance

Creating a Request for Advance:

At the **UTS Request Status** screen, **click** on **Create** or **click** on **File**, point to the **Create** option, and select **Request for Advance** on the drop down menu. The **Select Travel Order** screen appears:

- Click on the **Travel Order** to select.
- Click on **Create Advance for Selected Order** or **Create Advance for New Travel Order**.

Complete the **Request for TDY Advance** screen:

Amount - Click in this field then **type** the amount to be advanced.

Method of Payment - Defaults to **Direct Deposit**.

Accounting - Click on the **Modify Acctng** button then **Enter** the correct accounting data into the appropriate fields.

Request for Advance, (cont'd)

Accounting Remarks - Notice the **Remarks** box appears directly below the **Current Request Accounting Lines** table. This box is used to add remarks about the accounting appropriations for the current travel action. **Click** inside the text box and **type** in the remarks. **Click** the **Validate Accounting** button when finished.

When finished entering the required information at the **Request Accounting** screen, **click** the **Save** button.

Request Remarks - Back at the **Request for Advance** screen, it may be necessary or beneficial to add remarks to the Advance Request. **Click** the **Remarks** button to access the **Remarks Request** screen. **Type** the desired remarks and **click** the **Return** button when finished.

Release the **Request for Advance** to the **AO** for approval when ready.

Request for 1351-2 Settlement

At the **UTS Request Status** screen, there are two ways to access the **Request for TDY Settlement** screen:

Method 1: Click on the **Create** button. A drop down menu appears listing a variety of travel actions. **Click** on **Request for 1351-2 Settlement** and the **Select Travel Order** screen appears.

Method 2: Click on **File** and **point** on the **Create** option. A drop down menu appears listing a variety of travel actions. **Click** on **Request for 1351-2 Settlement** and the **Select Travel Order** screen appears.

At this screen **point** and **click** an order displayed and **click** the **Create Settlement for Selected Order** button. If the correct order is not displayed, **click** on **Create Settlement for New Travel Order** button.

Note: For **BLANKET** orders, make sure the Covered To/From dates are for the whole period of the authorized TDY.

After clicking the **Create Settlement for Selected Order** button or creating a new order, the **Request for TDY Settlement** screen appears. Complete the **Request for Settlement** screen.

Releasing Request for 1351-2 Settlement

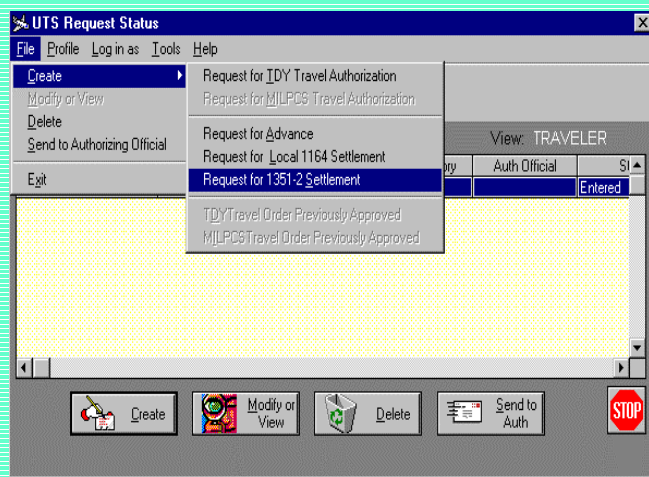
Either the **Traveler** or the **Signature Proxy** (designated by the Traveler) can perform this process.

Use these methods to release a Request for TDY Settlement:

Method 1: - Click on **Send to AO** at the bottom of the **Request For TDY Settlement** screen.

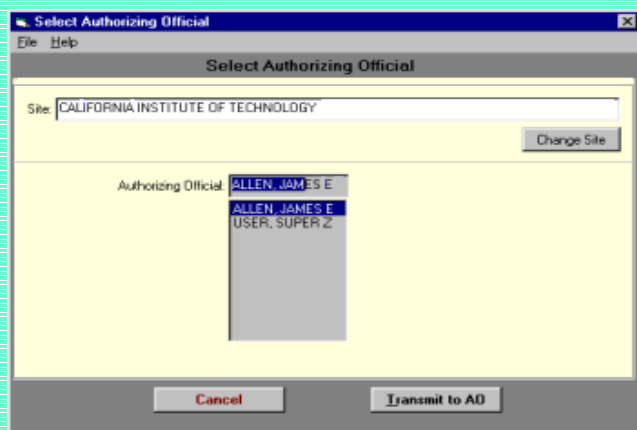


Method 2: - **Point and click** on the **Request For TDY Settlement** listed in the Claims List on the **UTS Request Status** screen, then **click** the **Send to Auth** button.



At the **Select Authorizing Official** screen, the name of the traveler's unit will be displayed at the **Site** field and the designated Authorizing Officials are listed below. If the correct AO is listed **click** on the desired name, then **click** on the **Transmit to AO** button. The user can also **click** on the **Change Site** button to select a different unit and see a list of Authorizing Officials for the newly selected unit.

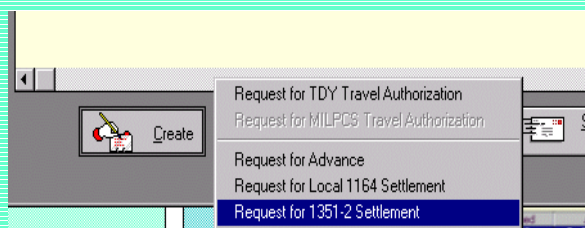
After selecting an AO, a pop-up appears requiring the entry of a **Confirmation Password**. Enter your Secondary Password.



After entering a confirmation password, UTS **forwards** the transaction to the **AO** and returns to the **UTS Request Status** screen.

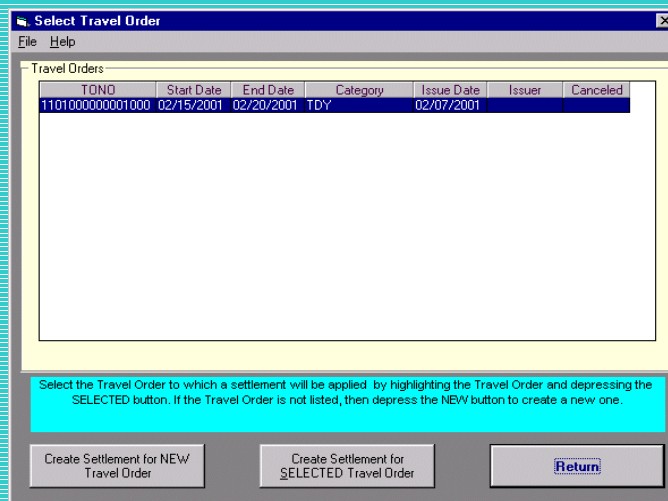
Supplemental Settlements

At the **UTS Request Status** screen, **click** on **Create** and select **Request for 1351-2 Settlement** from the drop down menu that appears.



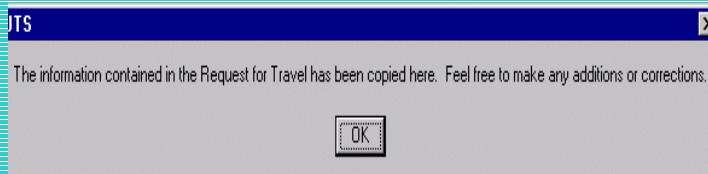
Supplemental Settlements, (cont'd)

At the following screen, **point and click** to select the **TDY Authorization** that applies from the list of Travel Orders. Then **click** on "**Create Settlement for SELECTED Travel Order**".



A prompt screen will appear to let you know information from the previous settlement has been copied forward to the supplemental.

Click the **OK** button.



UTS will open the prior **Request for TDY Settlement** with the word "**Supplemental**" already defaulted in the "Type of Settlement" field.

To change Itinerary, **click** on the **Add Trip** button.

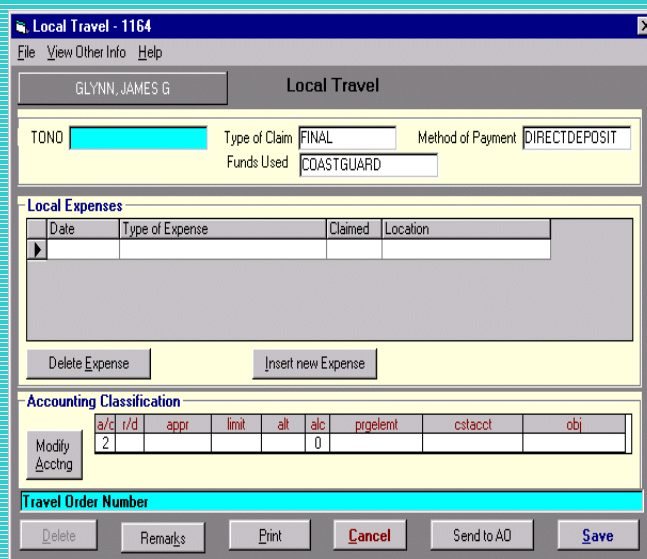
Note: The **Add Trip** button must be **clicked** to validate, even if there are no changes. If not done, the itinerary will be left blank.

Local 1164 Travel

Local Travel is claimed on **Standard From 1164** and under this circumstance, **no per diem** is payable.

At the **UTS Request Status** screen, access the **Local Travel - 1164**:

Click on the **Create** button. A drop down menu appears listing a variety of travel actions. **Click** on **Local 1164**.



Make the required input to complete this screen and **Save**.